Capturing the Presbyopic Market
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  • Acufocus
  • Valeant

Disclosures – Eric Brooker
› AcuFocus
› Visiometrics

Huge Market Opportunity
› 2.1 billion presbyopes by 2020*
  • 291 million with economic means
  • Plano presbyopes: 38.2%
  • Myopes >-1.0 D: 29.8%
  • Hyperopes >=1.0 D: 32%

*Source: Market Scope 2015 Presbyopia Report

Huge Market Opportunity Population Growth 2000 to 2010

The presbyopic population is growing over 10x faster than the pre-presbyopic population.

Think about your practice....
› How many patients are we losing a month by not having a solution?
› What would our volumes be like if we had a good solution?
The First Step to Capturing the Presbyopic Market

Is Understanding the Presbyopic Patient

What do we know about Presbyopes? Willing to spend money

<table>
<thead>
<tr>
<th>Group Name</th>
<th>% of Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Successful Spenders</td>
<td>19%</td>
</tr>
<tr>
<td>Average Affluents</td>
<td>23%</td>
</tr>
<tr>
<td>Prudent Purchasers</td>
<td>20%</td>
</tr>
<tr>
<td>Poor Penny pinchers</td>
<td>21%</td>
</tr>
<tr>
<td>Struggling Subsisters</td>
<td>7%</td>
</tr>
</tbody>
</table>

What do we know about Presbyopes? Spending power

- Control 70% of the total net worth
- 45-55 have a mean income of $80,803, the highest of any group
- 50% of the nation will be 50+ in 2017; the most wealthy and affluent, group
- Spend $400 billion more than young generations on consumer goods

What do we know about Presbyopes? Self View

- 58% have never seen an OD

- 42% of presbyopes are also myopic or hyperopic but majority have never worn glasses before and Frustrated

- Actual Age: 20s: 21.3, 30s: 26.6, 40s: 30.6, 50s: 39.6, 60s: 49.9

- Most ‘feel much younger’ than their actual age.

- Today’s 40 – 60 year old maintains a very active lifestyle involving career, travel and outdoor activities.
What do we know about Presbyopes?

- More than 50% of boomers exercise regularly
- 72% of boomers plan to keep working in some capacity after retirement
- 66% of boomers send text messages
- 90% of boomers are on the computer
- 65% of seniors (66+) have a cell phone
- 82% of seniors 65+ are on the road, driving

What do we know about Presbyopes? They don't find Reading Glasses Cool!

What do we know about Presbyopes? We have research findings from:

3. Del Webb 2010 Baby Boomer Survey

- Onset mid-40's during height of career
- Presbyopic population is growing as baby boomers age
- They are concerned about their appearance
- This generation coined the phrase “anti-aging”
  - BOTOX (onabotulinumtoxinA)
  - Rogaine (minoxidil topical)
  - Viagra (sildenafil)

What do we know about Presbyopes? They feel Presbyopia is a Lifestyle Problem

- Loss of near vision interferes with everyday activities
  - Shopping
  - Sending text messages
  - Seeing time on watch
  - Reading a menu
- Frustration with reading glasses
  - Own multiple pairs
  - Can never find reading glasses

What do we know about Presbyopes?

- Common Beliefs About Reading Glasses
  - Feel like their parents
  - Reveals their age
  - Inconvenient
  - Embarrassing
  - Lost self confidence
  - Restrictive
  - Desire to have the vision of their 20’s

Source: 230 KAMRA VISION™ Clinical Trial Patients
What do we know about Presbyopes?

- What they say is “I want to be able to read”
- What they want is Accommodation

What do we know about Presbyopes? Psychology of the Presbyope

- Satisfied with life overall
- Think about their future goals and priorities more than the past generations
- Expect to be more active than their parents
- Yearning for self reliance
- Starting to feel they are losing control in some areas of life

Source: AARP Research, 2014

Why do we concentrate on Myopes?

- Climbing the ladder
- Image conscious
- Surgery is a commodity
- Like finance
- 65% of those considering laser say cost is main concern and distance from eye care
- 25% friends myopic

When we can concentrate on Presbyopes....

- Financially independent
- Age conscious
- Want richer information
- Not interested in finance
- Health is a priority
- Want to look & feel younger
- Most friends are presbyopic

Word of mouth is KEY with this group

- Myopes - will tell 23% of friends
- Presbyopes - will tell ALL their friends - as they ALL need glasses!

Let's discuss: Social Media and Presbyopes

Fun facts

- 72.4% of 45-64 year olds are connected to the internet
- 45% of 45-54 year olds are smartphone users
- 38% of 45-54 year olds own a tablet
- 81% of baby boomers are going online
- 55% of Americans between the ages of 45-55 have at least one profile on a social media website
- The biggest social media growth of any group in 2012 was the 45-55 year old demographic

Social Media and Presbyopes

Facebook best practices

- DON'T make statements without facts
- DON'T make statements without facts
- DON'T make statements without facts
- DON'T make statements without facts
Now that you understand the presbyope it’s time to implement Strategies for Success

- Best to have counselors that are also presbyopes
- They need to be able to relate to the patient population
- Great strategy is to have a staff member that has undergone a refractive presbyopic treatment
  - Counselor
  - Optometrist
  - Doctor

### Social Media and Presbyopes

**YouTube top tips**
- Be real, straightforward and honest
- Be entertaining – make it something people want to watch and share
- Be short – the average length of a video on YouTube is 3.8 minutes, make your film less than 5 minutes long
- Think outside the box – be creative and find new ways to engage
- Update your YouTube channel with new patient testimonials weekly
- Share updated content with your Social Media team, link it to your Facebook page and tweet about it

### Staffing

- Myopes
  - Age 20-44
- Presbyopes with clear lens
  - Age 45-65
- Presbyopes with Cataract/IOLs
  - Age 66+

### Connecting with the Presbyope

<table>
<thead>
<tr>
<th>Avoid</th>
<th>Try</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Definition</td>
<td>Frustratingly Natural</td>
</tr>
<tr>
<td>Aging</td>
<td>Change</td>
</tr>
<tr>
<td>Getting Old</td>
<td>Over Time / As We Celebrate Birthdays</td>
</tr>
<tr>
<td>Like Wrinkles</td>
<td>Everybody</td>
</tr>
<tr>
<td>Like Gray Hair</td>
<td>Gradual</td>
</tr>
<tr>
<td>Jokes</td>
<td>Empathy</td>
</tr>
</tbody>
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### Presbyopic Decision Tree

We have the patients….now what?
Presbyope with Clear Lens….

Corneal Procedure

KAMRA-to bridge the gap before cataract surgery

KAMRA (3.8 mm)
- KAMRA Inlay
  - By AcuFocus (Irvine, CA)
  - 3.8 mm Diameter / 1.6 mm Aperture
  - Made of Polyvinylidene Fluoride (PVDF)
  - Small Aperture – Increased Depth of Focus

Corneal Inlay
- Weight = 100 mcg
- Thickness = 5 µm
- Material = Polyvinylidene Fluoride PVDF (IOL haptics)

Inlay Design
- 8,400 micro-perforations (5-11µ)
- Pseudo-random pattern
- Maximize nutrient flow
- Minimize visual symptoms

How It Works
- The inlay works like an aperture in a camera (opening)
- This small opening allows only focused images in the eye
- Only focused light rays allowed to reach the retina
- Same principle used in camera lenses to increase depth-of-focus
Pre-op considerations
Refractive Target and Visual Acuity

<table>
<thead>
<tr>
<th>MRSE</th>
<th>UCVA</th>
<th>UCNA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over +1</td>
<td>20/20</td>
<td>J-5</td>
</tr>
<tr>
<td>0.75 to 0.99</td>
<td>20/20</td>
<td>J-3</td>
</tr>
<tr>
<td>0.5 to 0.74</td>
<td>20/20</td>
<td>J-5</td>
</tr>
<tr>
<td>0.25 to 0.49</td>
<td>20/20</td>
<td>J-3</td>
</tr>
<tr>
<td>0 to 0.24</td>
<td>20/20</td>
<td>J-2</td>
</tr>
<tr>
<td>-0.25 to -0.01</td>
<td>20/20</td>
<td>J-1</td>
</tr>
<tr>
<td>-0.50 to -0.26</td>
<td>20/20</td>
<td>J-3</td>
</tr>
<tr>
<td>-0.75 to -0.51</td>
<td>20/20</td>
<td>J-3</td>
</tr>
<tr>
<td>-1 to -0.76</td>
<td>20/20</td>
<td>J-3</td>
</tr>
<tr>
<td>Less than -1</td>
<td>20/20</td>
<td>J-3</td>
</tr>
</tbody>
</table>

**KEY LEARNING:**
- Dominant eye: plano
- Non-Dominant eye: -0.75 to -0.50D

68.5% of patients enrolled in the clinical trial had a pre-op MRSE between 0.00D to 0.50D.

Optimal residual refractive error between 0.01D to -0.75D.

31.5% of patients enrolled in the clinical trial had a pre-op MRSE in the optimal range.

Who is our KAMRA patient?

**EMMETROPES**
(No refractive error)

**AMETROPES**
(Far-sighted or near-sighted)

Post-LASIK

**MONOFOCAL PSEUDOPHAKES**


Pre-op testing
Picking the right patient

- Dislikes reading glasses
- Views loss of near vision as a disability
- Cosmetic and lifestyle motivated
- Willing to participate in recovery process
- Financial means

Pre-op testing
Assessing Patient Lifestyle

**How important are the following activities in your daily life?**

- Reading Text
- Reading Numbers
- Working on a Computer
- Seeing your Mobile Phone
- Performing Detailed Tasks
- Driving at Night

Very Important
Somewhat Important
Not Important
Long-Term Results
Emmetropic Patients
- Over a 5 year time period a presbyopic patient on average can expect to lose a line of vision
- Patients with a KAMRA inlay, over the same time period, do not experience a loss of near vision

What Patients Can Expect
- Resume most activities the next day
- Clarity of vision may occur within the first 24 hours, but generally takes 1-3 months (80% of patients)
- Vision may fluctuate for the first few months
- Magnification or LIGHT may still be needed for
  - Seeing tiny print, reading in dim light conditions, or performing a near task for an extended period of time

Cosmesis
- The inlay may be visible in light eyes from an oblique angle or when a patient has a pupil smaller than 3.8mm in the non-implanted eye.

So what about the Presbyope with a Cataract?

The prior IOL Portfolio

Single Power Lenses
- Corrects only distance vision
- Does not accommodate in eye
- Glasses required

Multifocal Lenses
- Multiple, fixed focal points
- Does not accommodate
- Must find appropriate focal point
- Extensive neurological adaptation
- BUT have issues with halos and glare
- 33 cm working distance

Accommodating Lens
- Single focal point
- Full range of distance, intermediate & near vision
- Uses eye’s natural focusing mechanism
- BUT doesn’t work for everyone
- Takes time to work

Multifocality 2014 and prior......
- Patients wanted all distances
- What were options for intermediate?
Do not underestimate the importance of good intermediate vision!!

TECNIS Multifocal IOLs +3.25 D and +2.75 D
Clinical Outcomes

Spontaneous Reports of Halos in a Non-Directed Study

94% none or mild

TECNIS Multifocal IOLs changed that!
MORE CHOICE = MIX AND MATCH = Happier patients
Biconocular Debrief 6 Months

Mix and Match to give majority of reading.

TECNIS Multifocal IOLs +3.25 D and +2.75 D
Clinical Outcomes

Spontaneous Reports of Night Glare in a Non-Directed Study

99% none or mild

OK so.....We have the solutions-
Lets get MARKETING

Prepare Early    Set a Goal
Develop Plan    Involve the Team

Success Factors for Marketing

• Target the Right Patients
  ◆ Meet medical criteria
  ◆ View presbyopia as a disability
  ◆ Listen carefully to objections
• Always Under Promise and Over Deliver
Step 1: Set a Goal

Goal

Step 2: Develop Your Plan

Start with your reception area On Screen

Demonstrate how it works

Step 2: Develop Your Plan

Connect with Your Database

Snail Mail, Email or Text

Call Them

Step 2: Develop Your Plan

Seminars

Friends & Family

Referral Partners

Invite Public

Step 2: Develop Your Plan

Cross Promote with Cosmetic Patients

Connect to Potential Patients

Step 2: Develop Your Plan

Go To The Presbyope: Golf Clubs, Gyms & Mall Kiosks
Step 3: Execute Your Recruitment Plan

Key Take Away

- Set a Goal
- Develop a Marketing Plan that Includes a Recruitment Plan
- Involve the Whole Team
- Measure Your Success Based on Your Implant Goal
- Modify Your Plan as Necessary

Presbyopia Market

- Largest unmet need in ophthalmic surgery
  - 99.8% of presbyopic eyes are not being addressed with present technology
- Fastest growing population segment around the world
- Huge opportunity for “Presbyopic Surgeons” and companies developing products in this space
- Can you be the #1 LASIK practice in market?
- HUGE OPPORTUNITY TO BE THE #1 PRESBYOPIC PRACTICE IN MARKETPLACE

Yes, this happens to all of us!

Thanks!